

211 Perimeter Center Pkwy, #325 Atlanta, Georgia 30346 770-454-1440 www.leadstrat.com

GSA Awarded Pricing General Services Administration Federal Supply Service Professional Services Schedule 00CORP



211 Perimeter Center Parkway Suite 325 Atlanta, Georgia 30346 www.leadstrat.com

> 1.800.824.2850 Fax: 1.770.454.1460

Contact: Sherry D. Wilkinson swilkinson@leadstrat.com 1.770.454.1440 x30

CONTRACT NUMBER:

GS-10F-0435R

PERIOD COVERED BY CONTRACT:

August 18, 2015 through August 17, 2020

Business Size: **Small** DUNS: 84-560-7902

Special Item Numbers (SIN)

874-1 Integrated Consulting Services

874-4 Training Services:Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration, Learning Management, Internship, and

100-03 Ancillary Supplies and/or Services.

Leadership Strategies - The Facilitation Company is a national leader in professional facilitation, facilitation training, leadership training and soft skills training for information technology professionals. Since 1992, we have been halping organizations excel through our two

have been helping organizations excel through our two primary service areas.

Meeting Facilitation Services

We provide organizations with dynamic professional facilitators who facilitate executive teams and task forces in areas such as strategic planning, issue resolution, requirements analysis, process improvement, community engagement and conference forums.

Facilitation Training and Soft-Skills Training

We train your people in facilitation skills, leadership, team building, presentations and consulting skills. Each month, we offer several of these courses as public,



open enrollment classes in Atlanta, Boston, Chicago, Dallas, Denver, Houston, Las Vegas, Los Angeles, Seattle, Toronto and Washington, DC.

PDI Difference: What makes our training classes different? Nine out of ten participants rate our courses as *"The Best Course"* or *"One of the Best Courses"* they have ever taken. We think three elements in particular make us stand out. We call these the elements, the PDI Difference (Practical....Dynamic...Interactive).

SIN 874-1 Integrated Consulting Services

Organizations rely on us to guide them in successfully developing and implementing strategies for growth and solutions to business needs. Our facilitators save you money by using our extensive library of processes as a starting point for designing your meeting. Let us help you with...

Strategic Planning
Team Activation
Process Improvement
Issue Resolution
Team Building
Systems Requirements

Community Engagement Meetings Transformation Strategy Monitoring **Board Development and Board Meeting Facilitation Conference Facilitation Focus Groups Facilitated Systems Planning** Strategic Plan Assessment **Project Planning Facilitation** Survey Design, Analysis & **Implementation Team Review**

Skill Category	GSA Labor Rate per hour
Senior Director	\$465.00
Director	\$350.00
Principal	\$260.00
Senior Manager	\$210.00
Project Manager	\$175.00
Documenter	\$85.00

Note:

- 1. One day is 10 hours
- Prices exclude reimbursable travel expenses or travel time.





Senior Director

Functional Responsibilities: Guides the development of director-level and below. Lead facilitation sessions that include multiple stakeholder groups, with highly complex issues with highly-charged emotions, high dysfunctions, and high stakes/high impact outcomes. Our Directors are responsible for delivering key note speeches. They assist in the writing, developing and delivering of proposals. The sessions they facilitate could be strategic planning, process improvement, information system requirements analysis, team building, issue resolution, performance improvement, and organization development to name a few.

Minimum Education: Bachelor Degree

Minimum Experience: 20 years

Our Directors have 20 or more years of consulting, facilitation and training experience, with a minimum of 20 years in a structured, methodology-focused consulting environment as well as a minimum of 20 years managing project teams and must be certified in 5 of our services. Directors have ten or more consulting experiences that cover at least 4 of the following: strategic planning, process improvement, information system requirements analysis, team building, issue resolution, performance improvement, and organization development.

Our Directors have strong analytical and interpersonal communication skills, excellent writing ability, and an eye for quality and detail. They also have extensive experience as an orator.

Director

Functional Responsibilities: Guides the development of principal-level and below. Lead facilitation sessions that include multiple stakeholder groups, with difficult-to-highly complex issues, that have defined outcomes and moderate-to-high levels of expected dysfunction. Our Directors are responsible for delivering key note speeches. They assist in the writing, developing and delivering of proposals. The sessions they facilitate could be strategic planning, process improvement, information system requirements analysis, team building, issue resolution, performance improvement, and organization development to name a few.

Minimum Education: Bachelor Degree

Minimum Experience: 15 years

Our Directors have 15 or more years of consulting, facilitation and training experience, with a minimum of 15 years in a structured, methodology-focused consulting environment as well as a minimum of 15 years managing project teams and must be certified in 4 of our services. Directors have ten or more consulting experiences that cover at least 4 of the following: strategic planning, process improvement, information system requirements analysis, team building, issue resolution, performance improvement, and organization development.



Our Directors have strong analytical and interpersonal communication skills, excellent writing ability, and an eye for quality and detail. They also have extensive experience as an orator.

Principal

Functional Responsibilities: Guides the development of senior managers. Lead facilitation sessions that include multiple stakeholder groups, with moderate-to-difficult issues, that have defined outcomes and moderate levels of expected dysfunction. Our Principles are responsible for delivering conference training sessions with more than 200 participants. They assist in the writing, developing and delivering of proposals. The sessions they facilitate could be strategic planning, process improvement, information system requirements analysis, team building, issue resolution, performance improvement, and organization development to name a few.

Minimum Education: Bachelor Degree

Minimum Experience: 12 years

Our Principals have 12 or more years of consulting, facilitation and training experience, with a minimum of 12 years in a structured, methodology-focused consulting environment as well as a minimum of 12 years managing project teams and must be certified in at least 3 of our services. Principals have ten or more consulting experiences in at least three of the following: strategic planning, process improvement, information system requirements analysis, team building, issue resolution, performance improvement, and organization development.

Our Principals have strong analytical and interpersonal communication skills, excellent writing ability, and an eye for quality and detail

Senior Manager

Functional Responsibilities: Guides multi-session planning projects. Lead facilitation sessions that include single stakeholder groups, with simple-to-moderate issues, that have defined outcomes and low levels of expected dysfunction. Our Principles are responsible for delivering conference training sessions with more than 50 participants. They assist in the writing, developing and delivering of proposals. The sessions they facilitate could be strategic planning, process improvement, information system requirements analysis, team building, issue resolution, performance improvement, and organization development to name a few.

Minimum Education: Bachelor Degree

Minimum Experience: 10 years

Our Senior Managers have a minimum of 10 years of consulting, facilitation, and training experience with a minimum of 10 years in a structured, methodology-focused consulting environment as well as a minimum of 10 year managing project teams and must be certified in at least 1 of our services. Senior Managers have six or more consulting experiences in at least three of the following: strategic planning, process improvement, information system requirements analysis, team building, issue resolution, performance improvement, and organization development.

Our Senior Managers have strong analytical and interpersonal communication skills, excellent writing ability, and an eye for quality and detail.



Documenter

Functional Responsibilities: Documents the session results either in the session or once the session is complete.

Minimum Education: Bachelor Degree

Minimum Experience: 5 years

Our documenters have a minimum of 5 years administrative experience with proficient knowledge of Microsoft Office. The have excellent communication skills and general knowledge of the services we provide. They have previous documentation experience.

Project Manager

Functional Responsibilities: Maintains the budget, burn report, timeline for multi-session projects. Effectively communicates project inquiries. Communicates to the project team critical and timely information. Maintains close communication with project sponsor.

Minimum Education: Bachelor Degree

Minimum Experience: 8 years

Our Project Managers have a minimum of 8 year of managing internal and external project experience with a minimum of 8 year in a structured, methodology-focused consulting environment as well as experience managing project teams. Project Managers have two or more years managing projects in at least two of the following: strategic planning, information system requirements analysis, team building, issue resolution, performance improvement, and organization development.

Our Project Managers have strong analytical and interpersonal communication skills, excellent writing ability, and an eye for quality and detail.



SIN 874-4 Training Services: - Public and Private Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration, Learning Management, Internship, and

Every one of our courses delivers the "PDI Difference":

- Practical...powerful techniques that you can apply right away.
- Dynamic...energetic facilitators that keep you engaged.
- Interactive...continuous interaction and practices to maximize your learning.

The <u>PDI Difference</u> is our mark of excellence. Every Leadership Strategies course will give you the techniques, motivation, and creativity to apply what you learn toward enduring results in the workplace.

Comprehensive and Customizable to Meet Your Needs

Our four series of courses cover every element required to optimize organizational performance.

- Do you have a number of people who need training? We can teach our courses on your site and even customize them with case studies and content to meet your specific needs. <u>Get more information about on-site</u> classes.
- We also offer public, open enrollment classes in Atlanta, Boston, Chicago, Dallas, Denver, Houston, Las Vegas, Los Angeles, Seattle, Toronto, Washington DC and Sydney Australia. <u>View our public class schedule</u>

Training Services - Public

Locations: Atlanta, Boston, Chicago, Dallas, Denver, Houston, Las Vegas, Los Angeles, Seattle, Toronto, Washington DC and Sydney Australia

Course Name	Number of Training Days	GSA Price		
The Effective Facilitator	4	\$1,720.00		
Facilitating Virtual Meetings - Comprehensive	3	\$1,340.00		
Facilitation Skills for Trainers	3	\$1,610.00		
The Facilitative Consultant	3	\$1,610.00		
Advanced Facilitation Skills	3	\$1,820.00		



The Secrets to Facilitating Strategy	3	\$1,700.00		
Facilitation Certification Preparation	2	\$1,030.00		

Training Services - Customer Site/Private

Locations: Customer Site - Worldwide

Course Name	Number of Training Days	GSA Price	Maximum # Participants	
The Effective Facilitator	4	\$20,230.00	16	
The Effective Facilitator/Streamlined	3	\$15,735.00	16	
The Facilitative Consultant	3	\$15,735.00	16	
The Secrets to Facilitating Strategy	3	\$15,735.00	16	
Advanced Facilitation Skills	3	\$15,735.00	16	
Facilitating Virtual Meetings - Comprehensive	3	\$13,935.00	16	
Facilitation Skills for Trainers	3	\$15,735.00	16	
The Effective Facilitator/Accelerated	2	\$11,240.00	16	
Effective Teams Work	2	\$11,240.00	16	
Masterful Meetings	2	\$10,610.00	16	
Facilitating Virtual Meetings - Essentials	2	\$6,740.00	16	
Masterful Meetings/Streamlined	1	\$6,740.00	24	
Making Technical Meetings Work	1	\$6,740.00	24	
The Effective Communicator/DISC	1	\$6,740.00	24	
The Seven Separators	1	\$6,740.00	24	
Facilitating Strategic Planning	1	\$6,740.00	24	

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Sin100-03 - Ancillary Supplies and/or Services.

Products may be <u>purchased online</u> or by calling Leadership Strategies at 1-800-824-2850. Please note: payment is required prior to shipping of products.

Product name	Unit of Issue	GSA Price		
Buying Styles - Hardcover	1	\$15.00		
Click: The Virtual Meetings Book	1	\$30.00		
Facilitation Excellence: The Seven Separators Workbook	1	\$55.00		
Facilitation Guides Workbook	1	\$65.00		
Facilitation Skills for Trainers Workbook	1	\$225.00		
Strategies for Managing Client Relationships Workbook	1	\$55.00		
The Advanced Facilitation Skills Workbook	1	\$135.00		
The Effective Consultant Workbook(Color)-V2	1	\$315.00		
The Effective Facilitator Workbook(Color)-V2	1	\$315.00		
The Executive Guide to Facilitating Strategy book	1	\$30.00		
The Masterful Meetings Workbook	1	\$135.00		
The Secrets of Facilitation - 2 nd Edition	1	\$45.00		
The Secrets to Facilitating Strategy Workbook	1	\$135.00		
The Secrets to Masterful Meetings -ebook	1	\$10.00		
The Secrets to Masterful Meetings - Paperback book	1	\$15.00		

Expenses and Travel time are included on a task order basis and are not part of the GSA schedule.





The Effective Facilitator

The Effective Facilitator - our flagship course - is a four-day class covering the ten principles of facilitation and includes six practice sessions. The ten principles cover the full range of facilitation techniques used for preparing, starting, focusing, recording, engaging, energizing, building consensus, managing dysfunction and closing. The sixth practice is a capstone exercise in which each student is video-taped facilitating the entire class using all the techniques they learned in the previous three days. Participants tell us they gain nearly as much from preparing for, executing and watching others execute this final exercise as they learned in the rest of the class.



The Effective Facilitator /Streamlined

The Effective Facilitator/S - The Streamlined Workshop is a three-day class and includes five practice exercises. The course covers the 10 principles as in the standard class. However, no video-taping or capstone exercise is included. Due to the slightly faster pace and the reduced exercise time, the Streamlined Workshop may not be as appropriate for people with minimal facilitation experience. One day is equal to 10 hours. The price per participant does not apply for 16 or fewer participants.



The Effective Facilitator /Accelerated

The Effective Facilitator/A - The Accelerated Workshop is a two-day class and includes three practice exercises. The course covers the 10 principles, as in the standard class, but at an accelerated pace. No video-taping or capstone exercise is included. Due to the much faster pace and the significantly reduced exercise time, the Accelerated Workshop is designed for veteran facilitators and is NOT appropriate for people with minimal facilitation experience. One day is equal to 10 hours. The price per participant does not apply for 16 or fewer participants.



The Facilitation Certification Preparation

The Certified Master Facilitator™ (CMF) designation is the highest level of certification available to facilitators. This course integrates *The Effective Facilitator* with the 30 CMF sub-competencies, resulting in a dynamic, power-packed five-day session that gives you everything you need to prepare for certification! The course includes:



Overview of the CMF certification

Instruction in the 90+ techniques from *The Effective Facilitator* integrated with the 30 CMF sub-competencies

250 page workbook and a supplement on CMF competencies

Special feature: Through our special arrangement with the CMF certifying body, you will receive a videotape of your facilitation that can be submitted for CMF certification!

The International Institute for Facilitation (INIFac) grants the prestigious (CMF) designation. To become certified, you must submit a list of your facilitation experiences, a list of references, a written application that responds to the 30 CMF subcompetencies, and a videotape of you facilitating a session assigned by INIFac (see www.INIFac.org). The videotape must meet stringent INIFac requirements designed to ensure the integrity of the process. As a INIFac partner, we work on your behalf to create a videotape in the class can be submitted to NIFac for certification. Following the class, you will be able to complete the written assessment with confidence and submit the videotape, along with your references and experience list, for INIFac certification.



Advanced Facilitation Skills

After you have learned the basics, The Advanced Facilitation Skills Workshop will move your skills to the next level. This course is designed to help you gain an understanding of the "Level 3 Facilitator" and allow you to assess at which level you currently operate. The DISC communication styles model is used to provide you with insights in facilitating different personality types. During the course, each participant is given two opportunities to facilitate, and get valuable feedback from the veteran group. This course is available in a 3-day option, either in a public or on site private setting. (This course requires prior participation in The Effective Facilitator or The Accelerated Workshop). One day is equal to 10 hours. The price per participant does not apply for 16 or fewer participants.



Facilitation Skills for Trainers



This three day course will equip you with a full toolbox of strategies for engaging participants in dynamic and interactive training segments. Bring a module of your own class to get feedback and recommendations for transforming it using the *Facilitation for Trainers* techniques!



Facilitating Strategic Planning

In this one-day session, Facilitating Strategic Planning provides facilitators with both an understanding of a strategic planning process and a structured guide for facilitating strategic planning sessions. The facilitation guide employs the techniques of The Effective Facilitator, a four-day course which provides aver 90 specific facilitation techniques and includes guides for ten commonly facilitated sessions. The topics covered in the session include: The key components of strategic planning, preparing for the plan, facilitating the strategic planning sessions, and keys to successful implementation. One day is equal to 10 hours. The price per participant does not apply for 16 or fewer participants.



The Facilitative Consultant

To be an effective consultant requires much more than strong technical skills. Whether you are an internal employee or an external resource, you need a multitude of "soft" skills. You must manage expectations, build trust, isolate key objectives, and manage client relationships. Technical expertise alone is not enough! You have to be able to understand your client's business, identify critical problems, develop clear solutions, and provide convincing recommendations for action. Through six focused exercises, The Facilitative Consultant three day course provides an environment for increasing your skills in these areas and more. One day is equal to 10 hours. The price per participant does not apply for 16 or fewer participants.



Effective Teams Work

What differentiates effective teams from ineffective ones? How does a great leader ensure a newly-formed team clearly understands its objectives, is focused, and is motivated to being productive? How does a great leader get members of an under-performing team inspired for change and action? Our course, **Effective Teams Work**, answers these questions and more. This highly-interactive two day course includes numerous exercises and in-class activities to provide the fundamentals for team success.





Masterful Meetings

The two day Masterful Meetings delivers a vision of what a great meeting should be. The course provides specific strategies for getting meetings started on time, keeping the discussion focused, eliminating dysfunctions, empowering people through *Meeting Rights*, and guiding the meeting when you are not the meeting leader.



Masterful Meetings/Streamlined

The one day Masterful Meetings delivers a vision of what a great meeting should be. The course provides specific strategies for getting meetings started on time, keeping the discussion focused, eliminating dysfunctions, empowering people through Meeting Rights, and guiding the meeting when you are not the meeting leader. This class provides fewer practice exercises than the two day class.



Making Technical Meetings Work

For people who lead technical meetings. This one-day course applies the tools from *Making Meetings Work* to the tougher environment of technical meetings.



The Secrets to Facilitating Strategy

This three day course provides a detailed understanding of each of the building blocks that make up a strategic plan and strategies for facilitating teams through the strategic planning process. You'll learn the Drivers Model, a road map for constructing a strategic plan for your organization and tips for judging the quality of each component of your plan, and more.



The Effective Communicator/DISC

Interpersonal, one-on-one communications is a challenging area for many. Problems like "We don't communicate very well", "We just don't speak the same language," and "We're not on the same wavelength", are often solvable once core communications styles and strategies are well understood. The Effective Communicator helps participants identify their basic communication styles and provides practical tips for identify and adapting to the styles of others. This course also teaches skills for effectively influencing, probing, persuading and challenging others. The DISC communication model is used to provide key insights for effective communications. All participants receive a 20+ page description of their communication style, with strategies



for adapting to the other styles. One day is equal to 10 hours. The price per participant does not apply for 16 or fewer participants.



The Seven Separator

For highly experienced facilitators only. If your team of veteran facilitators has only one day, this workshop focuses on the 7 key skills that we find separate great facilitators from good ones. During the workshop your team will gain keen insights into facilitation excellence and have opportunities to put the separators into practice.



Facilitating Virtual Meetings: Comprehensive

The three day online course is designed for people who frequently facilitate meetings where some or all participants are remote and may be dealing with meeting dysfunction. Facilitating Virtual Meetings- Comprehensive delivers a curriculum whereby facilitators can practice the proven methods that separate great facilitators from good ones. The price per participant does not apply for 16 or fewer participants.



Facilitating Virtual Meetings: Essential

This two day online course is designed to help you drastically improve the efficiency and productivity of your virtual meetings. Starting with an understanding of the common problems faced by virtual meeting leaders, this course provides step-by-step instructions you can use right away for seamlessly managing your virtual meetings.

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at http://www.fss.gsa.gov.



GSA Award Summary Information

Table of awarded special i	item number(s) w	rith appropriate cr	oss-reference to	item
descriptions and awarded	price(s).			

874-1 Integrated Consulting Service,

874-4 Training Services:Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration, Learning Management, Internship, and 100-03 Ancillary Supplies and/or Services.

1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract.

NOT APPLICABLE

1c. If the Contractor is proposing hourly rates, a description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform services shall be provided. If hourly rates are not applicable, indicate not applicable for this item.

Available upon request.

- 2. MAXIMUM ORDER:
- \$ 1,000,000.00
- 3. MINIMUM ORDER:

\$100.00

4. GEOGRAPHIC COVERAGE (DELIVERY AREA):

Worldwide.



5. Point(s) of production (city, county, and State or foreign country).
SAME AS COMPANY ADDRESS
6. Discount from list prices or statement of net price.
GSA Net pricing as shown in pricing tables provided
7. QUANTITY DISCOUNTS.
NONE
8. PROMPT PAYMENT TERMS:
Net 30 Days
9a. Notification that Government purchase cards are accepted at or below the micro-purchase threshold.
Will accept over \$2500
9b. Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold.
YES
10. FOREIGN ITEMS (LIST ITEMS BY COUNTRY OF ORIGIN):
NONE
11a. TIME OF DELIVERY:
SPECIFIED ON TASK ORDER



11b. EXPEDITED DELIVERY:
CONTACT CONTRACTOR
11c. OVERNIGHT AND 2-DAY DELIVERY:
CONTACT CONTRACTOR
11d. URGENT REQUIREMENTS:
CONTACT CONTRACTOR
12. F.O.B. POINT(S):
Destination
13a. ORDERING ADDRESS:
Same as company address
13b. Ordering procedures: For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA s), and a sample BPA can be found
at the GSA/FSS Schedule homepage fss.gsa.gov/schedules.
14. PAYMENT ADDRESS.
Same as company address
15. WARRANTY PROVISION.
CONTRACTORS' STANDARD COMMERCIAL WARRANTY



16. EXPORT PACKING CHARGES, IF APPLICABLE.

NOT APPLICABLE

17. TERMS AND CONDITIONS OF GOVERNMENT PURCHASE CARD ACCEPTANCE (ANY THRESHOLDS ABOVE THE MICRO-PURCHASE LEVEL).

CONTACT CONTRACTOR

18. TERMS AND CONDITIONS OF RENTAL, MAINTENANCE, AND REPAIR (IF APPLICABLE).

NOT APPLICABLE

19. TERMS AND CONDITIONS OF INSTALLATION (IF APPLICABLE).

NOT APPLICABLE

20a. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable).

NOT APPLICABLE

20b. Terms and conditions for any other services (if applicable)

NOT APPLICABLE

21. LIST OF SERVICE AND DISTRIBUTION POINTS (IF APPLICABLE).

NOT APPLICABLE

22. LIST



NOT APPLICABLE

23. PREVENTIVE MAINTENANCE (IF APPLICABLE).

NOT APPLICABLE

24a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants).

NOT APPLICABLE

24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contractor s website or other location.) The EIT standards can be found at: www.Section508.gov/.

NOT APPLICABLE

"The Service Contract Act (SCA) is applicable to this contract as it applies to the entire 00Corp: Professional Services Schedule and all services provided. While no specific labor categories have been identified as being subject to SCA due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29 CRF 541.300), this contract still maintains the provisions and protections for SCA eligible labor categories. If and / or when the Contractor adds SCA labor categories / employees to the contract through the modification process, the Contractor must inform the Contracting Officer and establish a SCA matrix identifying the GSA labor category titles, the occupational code, SCA labor category titles and the applicable WD number. Failure to do so may result in cancellation of the contract."



25. DATA UNIVERSAL NUMBER SYSTEM (DUNS) NUMBER.

84-5607902

26. Notification regarding registration in Central Contractor Registration (CCR) database.

Cage Code #: 1MCS3

The Service Contract Act (SCA) is applicable to this contract as it applies to the entire 00CORP: Professional Services Schedule and all services provided. While no specific labor categories have been identified as being subject to SCA due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29 CRF 541.300), this contract still maintains the provisions and protections for SCA eligible labor categories. If and / or when the Contractor adds SCA labor categories / employees to the contract through the modification process, the Contractor must inform the Contracting Officer and establish a SCA matrix identifying the GSA labor category titles, the occupational code, SCA labor category titles and the applicable WD number. Failure to do so may result in cancellation of the contract.

